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cpb **Research Notes**

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Highlights from the PUBLIC TELEVISION PROGRAMMING SURVEY, 1988

Broadcast days continue to lengthen

The average public television broadcast day continued to increase during the 1987-88 season. The number of hours broadcast reached a daily average of 16 hours and 48 minutes, a nine percent increase from 1985-86 and a 58 percent increase overall since 1973-74. In the course of an average day during the season, public television broadcasters aired about 28 programs, an increase of about 2 programs per day from the previous season.

The average number of broadcast hours and of programs both showed consistent growth over the preceding twelve years.

Program types continue to shift toward older, "general" audiences

Programs aired by public broadcasters are typically divided into three types, defined by their intended audience and use: "general audience" programs (accounting for 72.9 percent of broadcast hours during 1988) and instructional programs (15.5 percent of airtime), with a third category ("dual use") consisting of crossover programs produced by Children's Television Workshop, such as *Sesame Street* and *The Electric Company*, which accounted for 11.7 percent of airtime in 1988.

Although the percentage of all programming devoted to general audience programming decreased slightly since 1986, from 74.5 to 72.9 percent, the overall trend since 1974 was a shift away from children's and instructional programming and an increased number of hours airing such program types as news and public affairs and information and skills programs. The average public television broadcaster aired about 2 hours and 44 minutes of news and public affairs programs and 5 hours and 19 minutes of information and skills programming a day.

News and public affairs programming includes such programs as *MacNeil/Lehrer NewsHour*, *Wall $treet Week*, and *Washington Week in Review* and information and skills programming includes *NOVA* and *This Old House*.

In spite of overall growth in general audience programming, general programs specifically for pre-school children and youth (a category that does not include pre-school children's "dual use" programming such as *Sesame Street*) dropped to a record low of 5.8 percent of airtime. The percentage of cultural programming has also decreased from 20.5 percent of airtime in 1986 to 17.9 percent of airtime in 1988; a level exactly the same as in 1974.

Instructional programming continued to increase its share of broadcast time, increasing from 14.5 percent in 1986 to 15.5 percent in 1988; however, instruction programming decreased considerably from 1974 (17.1 percent).

Less airtime going to programs produced within public television

Public television stations continued to produce a large share of programming (32.3 percent of total airtime in 1988). However, this share, which combines production by "major producing stations", all other public television stations, and local production by the station airing the program, decreased by over 10 share points from 42.8 percent of total airtime in 1986. Despite the overall growth in the broadcast day, the absolute number of broadcast hours devoted to programs produced by public television stations is at a record low. At the same time, consortium or U.S. co-production increased from 3.1 percent in 1986 to 9.1 percent in 1988.

For locally produced programming (i.e., programming which is produced by the station on which it is aired), a similar decline continued, from 11.4 percent in 1974 to 5.2 percent in 1988. Although there is an overall downtrend of the percentage of locally produced programming, the figure was exactly the same from 1986 to 1988, which may indicate a levelling off.

Conversely, airtime devoted both to programs made by independent producers in the U.S. and to those made by foreign producers including international co-production increased, together reaching a high of 49.5 percent of total airtime. U.S. independent producers' share climbed 6.4 points to its highest level (35.5 percent) in 1988. Foreign-produced programs (including international co-productions) more than tripled in their absolute number of broadcast hours on public television since 1974 through 1988 and more than doubled in their share of airtime, from 5.8 percent to 14 percent.

PBS-distributed programs less dominant in schedules

Since its inception, PBS has been the principal distributor of public television programming. In 1988, however, the PBS-distributed programs' share of all airtime was at its lowest level in 14 years, although its 62 percent share, even when compared with the 71.6 percent in 1978, remained unquestionably dominant.

Locally-distributed programming which had been declining from 1974 to 1986, increased from 4.9 percent in 1986 to 6.4 percent in 1988, a rise of 1.5 percentage points in airtime between the last two surveys.

The Interregional Program Service and other regional networks drastically increased their overall airtime, from 9.6 percent in 1974 to 17.8 percent in 1988.

The remaining distributors (a "catchall" combining commercial syndicators, the Agency for Instructional Technology, CPB's minority program consortia, and other instructional and non-instructional program distributors), experienced a 13.8 percent decrease in broadcast hours, decreasing by 3.4 percentage points from 1986.

The table on the following page summarizes the information contained in the Public Television Programming Survey for 1988.

SUMMARY OF PUBLIC TELEVISION PROGRAMMING, 1974-1988[1]
Historical Trends

System Characteristics	1974	1976	1978	1980	1982	1984	1986	1988
Number of Television Stations	238	253	272	281	291	303	313	322
Number of Broadcasters	151	152	156	160	164	169	182	186
Broadcasters in the Survey[2]	151	152	156	160	164	169	178	169
Broadcast Hours and Number of Program								
Average Annual Hours per Broadcaster	3,872	4,542	4,894	5,128	5,421	5,542	5,650	6,135
Average Annual Number of Programs per Broadcaster	6,547	7,607	8,282	8,823	9,162	8,978	9,327	10,127
PERCENTAGES OF TOTAL BROADCAST HOURS								
A. Program Content								
General	61.6	66.5	70.7	71.3	72	73.2	74.5	72.9
News and Public Affairs[3]	12.6	11.9	11	12.2	12.4	14.1	16.4	16.3
Information and Skills	15.9	19.9	23.6	22.8	24.5	25.5	29.5	31.7
Cultural	17.9	20.9	22.1	21.9	22.8	20.1	20.5	17.9
General Children's & Youth[4]	10.7	10	8.7	8.9	7.5	7.9	6.5	5.8
Other General	4.4	3.8	5.3	5.5	4.8	5.5	1.6	1.2
Sesame Street & Electric Co.	21.2	17.8	16.1	15.5	14.8	14.8	11.4	11.7
Instructional	17.1	16.6	14.9	14.7	14.3	13	14.5	15.5
Electric Co. and Villa Alegre[5]	-	-	1.8	1.6	1.5	1.1	1	0.4
Other Children's & Youth	15.2	13.4	12.1	12.2	11.8	11.4	n/a	n/a
Adult Educational	1.9	1.4	1.2	1	1.4	0.6	n/a	n/a
B. Producer[6]								
Local (Broadcaster's Facilities)	11.4	10.1	7.7	7	6.7	5.7	5.2	5.2
Major PTV Production Center	45.4	21.5	24.2	28.4	25.9	44.4	37.6	27.1
Other PTV Source		26.7	28	17.8	19.7			
Consortium/U.S. Co-production	2.5	1.7	1.8	2.7	2.6	3.3	3.1[7]	9.8
Children's TV Workshop	22	18.8	16.8	17.1	15.8	16.4	29.1	16.1
Independent Producer	5.9	6.1	5.3	7.9	11.3	9.2		19.4
Foreign Producer	5.8	7.6	9.1	7.8	6	8.9	11	8.7
International Coproduction				4.7	4.1	4.3	4.1	5.3
Commercial Producer	1.9	2.8	2.7	3.2	3.9	2.8	5.5	4.4
Non-PTV ITV Producer								4
Other	5.1	4.6	4.4	3.5	4	4.6	4.4	0.1
C. Distributor								
Local Distribution Only	11.3	10	7.4	6.8	6.2	5.6	4.9	6.4
Public Broadcasting Service	62.1	69.3	71.6	69.6	67.1	65.3	63.9	62
Regional PTV Network	9.6	6.2	5.4	7.6	10.8	13	14	17.8
Other	17	14.5	15.6	16	15.9	16.1	17.2	13.8

1 1974 and 1976 are calendar years. 1978 to 1988 are fiscal years. 1988 survey used different methodology.
2 In 1988 only broadcasters in the 50 states and the District of Columbia were surveyed.
3 In 1986 and 1988 this category includes "Business or Consumer".
4 Excluding *Sesame Street* and *The Electric Company;* including *Mister Rogers Neighborhood*.
5 After 1974 *Villa Alegre* programs were double counted if aired during school hours when school in session.
6 1984, 1986, and 1988 definitions and categories differ from those used in prior reports.
7 In 1986 "U.S. Co-production" replaced "Consortium".